



# Training

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## Enterprise Reporting Financial Reports - Advanced Users

**Class Description:** 3 hour class - Participants will learn how to obtain relevant business data using the features for flexible standard reports; they will build their knowledge of selecting key data for monitoring revenues and expenditures; and learn how to schedule flexible financial reports i.e., *Allotment Expenditure/Revenue Status Flexible* and *Estimated Revenue Versus Actual Revenue Flexible* reports in the Enterprise Reporting (ER) system.

**Target Audience:** Financial managers, accountants, or program managers who need to review the appropriate business data for their budgeted expenditures or revenues.

**Prerequisites:** Participants will be most successful if they have taken the following class:

- ER Financial Reports - Intro/New Users

**Class Objectives:** At the conclusion of class participants should:

- Have knowledge of the flexible features e.g., detail about data pulls, sorts, and displays
- Have a general understanding of how to use financial reports in combination with agency chart of accounts to run management analysis reports.
- Understand the different data elements in particular financial reports that help you answer questions such as "what do I have to spend?", "what have I spent?", and "what do I have left to spend?"
- Know how to schedule allotment and expenditure and estimated revenues versus actual reports at different levels e.g., by account, program, organization.